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## horticultural products

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### EXPORT SUMMARY

U.S. exports of horticultural products were down by 6 percent during Oct-Nov. 1983, the first two months of fiscal year (FY) 1984. The improvement in exports anticipated for the new fiscal year has yet to materialize. The strong dollar, firm domestic demand, continuing economic problems in some markets, low prices for selected commodities and short crops for others all contributed to the poor performance to date.

During November, exports were down by only 2.3 percent from the previous year. The November decline was spread over a number of products but the key factors were lower shipments of apples, table grapes and canned fruit, and much lower prices for raisins and walnuts. Not completely offsetting these negative factors were improved returns from exports of fresh citrus, almonds, hops, and canned corn. Exports to key markets in the Far East remained buoyant in November, with the value of exports to Japan--lead by increased grapefruit, canned corn, and frozen french fry shipments--up by 31 percent and exports to Hong Kong--spurred by increased orange shipments--up by 41 percent. Sales to some other markets did not do so well. Venezuela, which closed its doors to most U.S. horticultural products because of its financial difficulties, purchased only \$2 million worth in November 1983 compared to \$24 million the previous year.

Although positive factors remain which could lead to growth in overall horticultural exports this fiscal year, the devastating freeze which hit Florida and Texas on Christmas Eve will diminish export potential. Grapefruit exports, especially to Europe--the destination for most Texas exports--and Florida vegetables, destined mostly for Canada, will be seriously affected.

For further information on items in this circular, contact the Horticultural and Tropical Products Division, (202) 447-6590. All measures in this report, unless noted otherwise, are metric. One kilogram (kg)=2.2046 lbs., 1 metric ton=2,204.6 lbs., 1 liter=0.2642 gallon, and 1 hectare=2.471 acres.

MARKET ACCESS AND OPPORTUNITIES

--The Republic of Korea has liberalized imports of lemons effective January 1, 1984. Imports previously had been prohibited to prevent competition with domestic fruit production. It is not yet known if lemons will be subject to the surveillance system. Under this system products may be freely imported until the government determines that the import level is excessive and to the detriment of the economy or a particular industry. If such a determination is made, import restrictions may be imposed.

In order to "equalize" duties for fresh fruits and nuts, South Korea has also proposed the following tariff changes:

<u>Commodity</u>	<u>Current Rate</u>	<u>Proposed Rate</u>
-----Percent Ad Valorem-----		
Almonds	40	50
Citrus	60	50
Cherries, fresh	40	50

--The Provincial Government of Quebec, Canada, has approved major changes in its wine regulations to strengthen the local wine bottling industry. The basic elements of the new regulations permit the eleven wineries (bottlers) in Quebec to:

- import wine in bulk and bottle it for sale in the 12,000 grocery stores in the province;
- import wine in bulk for bottling and reexport to other provinces and countries;
- import wines of controlled appellation for sale in the 360 outlets of the Quebec Liquor Board (SAQ).

Under previous laws, the Quebec wineries could only import 30 percent of the content of their production in bulk. The remainder consisted of wine made from imported grapes or must. The resulting product was of inferior quality. Consequently, wineries had difficulty competing with the SAQ which bottled wine that was entirely imported in bulk. The SAQ also had an exclusive monopoly on imported wines of controlled appellation.

Products bottled by the wineries must be sold under their own labels. This eliminates any label which refers to controlled appellation, type of grape, or geographic region, except country of origin. Since the labels of U.S. varieties and most U.S. generic wines refer to geographic location, they will not be allowed to be bottled in Quebec and sold under their original labels in grocery stores. All imported wines in bottles bearing original labels will be considered as controlled appellation and sold only in SAQ outlets.

The reexport feature of the new law, enabling wineries to import bulk wine, bottle and then reexport it, apparently is designed to help Quebec's wineries penetrate the U.S. market.

--The Japan External Trade Organization (JETRO), as part of its program to promote imports into Japan, sponsored a series of workshops in one Canadian and four U.S. cities from November 2-19. According to the Japanese team, 470 food products from 140 companies were evaluated during the trip and 40 new-to-market items suitable for introduction into Japan were identified. Many of the exhibitors were small and mid-sized companies with products not already available or well-known in Japan. These products were categorized as gourmet foods, health foods, and instant foods.

Successful negotiations between the Japanese supermarkets and trading companies on the team and the U.S. firms will largely be contingent on solving one or more of the following factors: (1) price, (2) use of the more costly to promote manufacturer's brand or the better known buyer's brand, (3) compliance or willingness to modify product formulas to meet Japan's food additive and sanitation standards, (4) modification of packaging to meet Japan's requirements for smaller sizes, and (5) willingness of sellers to accept orders for less than container loads until business can be built up. Future workshops may be held, although it was pointed out that the ideal situation would be for sellers to show their products in Japan.

--A proposed list of duty revisions affecting agricultural items has been prepared by the Taiwanese Government for presentation to the legislature. Approval could come as early as January 1984. Among the horticultural items on the list, with the rate applied to U.S. products, are the following:

BTN No.	Commodity	Percent ad val. or NT Dollars/kg	Original Rate	New Rate
			Original Rate	New Rate
0804-0210	Dried Grapes in Bulk	NT\$21/kg	NT\$15/kg	
0804-0220	Dried Grapes in Packages	NT\$24/kg	NT\$17/kg	
0805-0210	Walnuts, Shelled	38%	34%	
0812-0210	Prunes in Packages	43%	39%	
0812-0220	Prunes in Bulk	43%	39%	
2005-0000	Jams, Fruit Jellies, Marmalades, Fruit Puree & Fruit Paste	70%	60%	
2006-0110	Preserved Peaches	65%	45%	
2006-0120	Preserved Oranges	65%	45%	
2006-0400	Almonds, Preserved or Prepared	69%	56%	
2107-0400	Sweet Corn, Canned	NT\$26/kg or 75%	60%	
2209-0100	Brandy	75%	70%	

The approximate exchange rate is 40.2 NT dollars per one U.S. dollar. The above listed duty reductions are the result of previous negotiations and are scheduled to become effective January 1, 1984.

--The Philippine Government imposed an import ban on fresh fruits, liquor, and wine under all modes of payment in an effort to conserve scarce foreign exchange earnings and improve the balance of payments situation. This ban was effective November 25, 1983. The ban applies to items previously brought into the country by certain traditional importers and such entities as the National Food Authority, Food Terminal, Inc., and the Commissary of the Armed Forces of the Philippines. However, exceptions are given to hotels, supermarkets, department stores, and other tourist-oriented establishments which are authorized exchange dealers. Subject to Central Bank authorization, they may import banned consumer items up to 15 percent (versus the previous 40 percent) of foreign exchange earnings they surrendered to the Central Bank or the Philippine National Bank in the preceding year.

--A recent trade agreement signed between Egypt and Lebanon reportedly calls for \$5 million worth of apples to be imported by Egypt and a like value of items such as fertilizer shipped to Lebanon. The apples will be imported by a public sector trade company and sold through the government distribution system. However, the government maintains their ban on apple imports from other sources, including the United States.

--The Minister of Finance and Commerce of Pakistan announced on December 6 that onions can now be imported duty free. Previously there was a 100 percent import duty and a 10 percent sales tax. Although both have been withdrawn, there is still a five percent import surcharge. Onion prices have jumped five-fold in recent weeks because of short supplies. The supply situation should improve in mid-January with the harvest of the Sind crop.

#### MARKET PROMOTION

-- A market research study was conducted for the Potato Board in conjunction with FAS as part of ongoing efforts to promote frozen french fries in Japan. Since french fries are consumed mainly in fast food restaurants, the study examined in-home consumption patterns, attitudes and expectations of Japanese women regarding frozen french fries in order to evaluate the potential of directing promotional activities at this market. The main points of the study were usages, reasons for serving fries, the methods of preparation, and purchasing facts.

Among the findings were that the main consumers of french fries are children who consume them at birthday parties. French fries also are used as a side dish with the evening meal, or as a snack while drinking or watching movies. The Japanese housewife serves frozen fries because children enjoy them, they are easy to prepare, they add a nutritional balance to the meal, and they can cook as many or as little french fries as are necessary. The main method of preparation is stir frying in a wok with salad oil and seasoning with salt.

Purchases of french fries are generally made during the course of regular shopping at the supermarket . When purchasing french fries at the supermarket the consumer looks for the following factors: price, date of manufacture, state of preservation, i.e. how much frost is visible, and the type of bag in which the product is packaged. Most preferred the vinyl bag because they were easy to roll up when storing unused portions and the amount of visible frost can be easily determined.

COMMODITY UPDATE

--U.S. imports of fresh vegetables from Mexico may rise in the 1983/84 season as a result of increased Mexican plantings and severe freeze damage to the Florida crop. As of November 30 area planted to vegetables by private sector farms in Sinaloa, Mexico's major winter vegetable producing state, totaled 22,300 hectares--up 23 percent from the same point in the 1982/83 season. Tomatoes were up by 27 percent over last season, bell peppers by 35 percent, cucumbers by 27 percent, eggplant by 19 percent and zucchini by 1 percent. Private sector farms account for 70 to 90 percent of the total vegetable area in Sinaloa. Last season roughly half of the tomato, cucumber and squash and three-fourths of the bell pepper and eggplant plantings had been completed by the end of November.

U.S. imports of Mexican vegetables rose in 1982/83 following three peso devaluations in 1982 and a 27 percent increase in area over the prior season.

## U.S. IMPORTS OF VEGETABLES FROM MEXICO

Item	Metric Tons		\$1,000	
	1981/82	1982/83	1981/82	1982/83
Green beans.....	6,927	8,742	8,361	6,373
Garlic.....	7,498	8,569	10,105	6,577
Onions.....	62,146	75,438	21,095	19,750
Cucumbers.....	131,204	156,010	63,169	50,919
Eggplant.....	14,801	16,241	7,431	8,668
Peppers.....	73,958	62,080	61,727	43,704
Squash.....	44,161	50,995	24,436	26,828
Tomatoes.....	247,525	314,745	164,459	223,448
Asparagus.....	6,486	8,392	9,713	12,755
Others.....	45,493	51,577	21,434	18,239
Total.....	640,199	752,789	391,930	417,261

Year beginning in October 1.

SOURCE: U.S. Department of Commerce, Bureau of the Census.

Mexico competes primarily with Florida in the U.S. "winter" vegetable market. Percentages of the U.S. market for major winter vegetables supplied by each are shown below:

SHARE OF TOTAL SHIPMENTS OF MAJOR  
WINTER (OCTOBER-JUNE) VEGETABLES, 1982/83

Item	Florida	Mexico
Tomatoes.....	52	30
Peppers.....	45	22
Cucumbers.....	37	43
Squash.....	43	48
Eggplant.....	54	44

SOURCE: Agricultural Marketing Service

## COMMODITY UPDATE

Florida vegetable production was damaged by the Christmas weekend freeze. Losses to cucumbers and squash are reportedly heavy, while an estimated 60 to 80 percent of the tomatoes in the Southwest area were lost.

--The International Trade Commission (ITC) announced on December 12, 1983, that imports of potatoes from Canada have not been a substantial cause of injury to Northeastern potato growers. In November, the Department of Commerce determined that Canadian fall harvested, round white potatoes were being sold at less than fair value in the United States at an estimated dumping margin of 36.1 percent (see Horticultural Products Review, December 1983). As a result of the final ITC ruling, the dumping case filed by the Maine Potato Council in February, 1983, will be dismissed. Cash deposits and bonds posted since the preliminary Commerce determination in August will be repaid and imports liquidated.

Imports of fresh potatoes from Canada fell in FY 1983 for the first time in four years. Imports of table potatoes at 125,793 tons were down 23 percent from 1982 while seed potato imports fell 47 percent to 32,304 tons.

--Chile's exports of table grapes are forecast to increase by 8.6 percent in 1984. Last year's exports are estiated at 152,000 tons, up 39 percent from the previous year. In 1983, 75 percent of table grape exports went to the United States, compared to 80 percent in 1980. Other important markets are in Western Europe and the Middle East. The average FOB value of grape shipments was \$833 per ton in Jan-Sept. 1983, down from \$986 per ton in 1982.

--The Argentine Government has revised its export subsidy (reembolso) scheme for apples, pears and concentrated apple juice (CAJ) shipped from the Patagonian ports of San Antonio Este and Puerto Madryn. The new subsidies took effect on January 1, 1984 and are scheduled to remain in force for 11 years. Subsidies for non-Patagonian ports, such as Buenos Aires or Bahia Blanca are unchanged. The new rates are 1 percentage point less than those previously in effect. The current subsidy rates, expressed as a percent of the FOB value, are as follows:

Shipping Point	:	Fresh Apples	:	CAJ
	:	and Pears	:	
Non-Patagonian ports.....	:	0		5
San Antonio Este &	:			
Puerto Madryn.....	:	7		12
	:			

Most apple, pear and CAJ exports are shipped from San Antonio Este and Puerto Madryn. Although these ports are closer to growing areas, shipping rates are higher than for more northerly ports.

--On November 14, the European Community (EC) announced the production subsidy, or aid, to be paid to hop growers for the 1982 harvest. The subsidy is paid on a per hectare basis and is calculated by taking into account the average return on the areas in full production compared with the average returns for previous harvests, the current position of the market and price trends. The subsidy, converted to dollars at a rate of 1 ECU to \$0.813, is as follows (dollars per hectare):

Types of Hops	:	EC-9	:	Greece
Aromatic.....	:	244		85
Bitter.....	:	203		73
Other.....	:	244		85
	:			

--The United States is now the largest export market for Indian cashew kernels. The Soviet Union, which was previously the most important destination for Indian cashew nut exports, has sharply reduced purchases. Long term prospects for an increase in Indian cashew supplies are favorable because of a World Bank program to increase production. If these production increases materialize, India would no longer need to import in-shell cashews from Eastern Africa. These imports, in fact, have been declining since the late 1970's. U.S. imports of cashew kernels during FY 1983 (October/September) as shown below, were 28 percent more than the previous year. These imports were valued at \$142 million, FOB.

U.S. IMPORTS OF CASHEW KERNELS  
(Metric tons)

	:	FY 1982	:	FY 1983
Brazil.....	:	12,826		16,295
India.....	:	3,888		15,250
Mozambique.....	:	11,133		6,272
Tanzania.....	:	3,316		1,635
China.....	:	59		739
Kenya.....	:	343		446
Other.....	:	725		746
Total.....	:	32,290		41,383
	:			

CITRUS SITUATION

Citrus exports from Northern Hemisphere countries in 1983/84 are forecast at 5.88 million tons, about 4 percent above last year. The increase is largely attributed to heavier exports by Mediterranean Basin countries, especially Spain, Israel and Italy. U.S. citrus exports, however, are projected to be down markedly in 1983/84. This is mainly a result of grapefruit supply problems related to last month's freeze in both Florida and Texas, along with a smaller California orange crop. Orange and lemon exports by Northern Hemisphere countries in 1983/84 will exceed year earlier levels, although grapefruit volume is expected to decline based on smaller shipments by the United States. Citrus production in major producing countries of the Northern Hemisphere during the 1983/84 season is forecast at 31.7 million tons, 3 percent above 1982/83. 1/ Outturn of all major citrus varieties is expected to be up this season.

Mediterranean Basin

Spain, the Mediterranean's largest citrus producer and by far the world's number one exporter of fresh citrus fruit, is expected to record a significant increase in export shipments during 1983/84. Despite a season-long drought, export availability of all major citrus varieties is up markedly. This improved fruit supply together with an aggressive sales campaign, bolstered by the continued weaking of the peseta against other key currencies, should spur an increase in export shipments of nearly 15 percent over 1982/83. While export movement got off to a slow start this season, shipments have picked up in recent weeks and Spanish exporters are confident of meeting target levels. Lemon exports reportedly are meeting stiff competition from Italy with sales to Eastern Europe running at a sluggish pace.

Approximately 60 percent of this year's additional export volume will be composed of oranges, marketed almost exclusively in the European Community. This season, however, Spain intends to intensify promotional activity for oranges in the Middle East, particularly Saudi Arabia and Yemen. Exports will benefit from the government's 5.5 percent tax refund and from a subsidized credit program.

Lemon export movement is also projected to improve in 1983/84, although shippers will be forced to contend with stiff competition from competing suppliers and this season's below normal fruit size. The Spanish citrus trade believes that several new market outlets offer promising growth potential for Spanish lemon exports and have earmarked special promotional attention in 1983/84 for Scandinavia, Canada and Yemen. Spain also intends to explore the possibility of marketing more lemons in the United States, especially in major urban centers along the East Coast.

1/ Production estimates in this report for the United States and Mexico do not reflect December 1983 freeze damage. Orange and grapefruit losses in both countries are believed to have been significant but revised crop estimates are not yet available. Processing and trade estimates, however, have been adjusted to reflect the impact of the freeze.

The mid-term outlook for the Spanish lemon industry calls for a significant increase in production during the second half of the 1980's. Lemon outturn will by then be sufficient to support an export volume of 500,000 tons compared to 360,000 tons forecast in 1983/84. Given the fairly static level or, at best, slow growth rate of lemon consumption in Western Europe, increases in Spanish exports are likely to be in large part at the expense of other exporters such as Italy. U.S. exports to Europe will become increasingly difficult because of this expanding supply of relatively inexpensive Spanish lemons.

Improved trade prospects during the 1983/84 season also are projected for Spanish tangerine exports. Spain will attempt to further diversify its export outlets away from Western Europe by pushing sales to the Middle East and North America. Spain hopes to increase significantly its tangerine exports to the United States. Previously, U.S. health regulations required Spanish tangerines to be fumigated for Mediterranean fruit fly at the port of entry. With USDA supervision, exporters anticipate that fumigation will take place in Spain this season which should facilitate a larger movement.

The Israeli citrus industry is looking for renewed prosperity in 1983/84 based on the anticipation of a successful export season. Citrus production again proved unprofitable for many growers last year, due in large part to the smaller export volume, and total citrus area continued its downward trend as growers switch to more attractive crop alternatives. In 1982/83, only 45 percent of the crop was marketed in export channels compared to the standard 65 percent level recorded in recent years. Despite a decline in total citrus outturn, export availabilities should be up in 1983/84 and the Citrus Marketing Board projects that 56 percent of the current crop will be exported.

Fruit quality is much improved this year and exports, particularly Shamouti oranges and grapefruit, should respond favorably. Israel hopes to recoup last year's lost sales in the key export markets of West Germany and the United Kingdom. Israeli grapefruit exports to Western Europe will be boosted this year by freeze-shortened crops in both Florida and Texas. Additionally, a wider carton selection, tailored for each citrus variety, is to be offered to West European importers. A policy change by the government calling for an accelerated rate of devaluation of the Israeli currency also will contribute to enhanced export profit margins.

Citrus fruit utilization by the Israeli processing sector is expected to fall sharply this season. Israel's large grapefruit juice inventory, accumulated during the 1980/81 and 1981/82 seasons, was reduced to a more manageable level last year through opportune sales in Western Europe. Production of both orange and grapefruit juice will decline this year. Israeli exports of orange juice are likely to decline in the near-term as domestic outturn falls off and imports for blending and re-export diminish due to a tightening of world supplies of frozen concentrated orange juice.

The Moroccan citrus industry is braced for another difficult season in 1983/84. The prolonged drought that so adversely affected fruit output a year ago continues largely unabated with a general feeling of pessimism among growers in many water short areas. Concern exists over the availability of export grade fruit. Nevertheless, Morocco hopes to maintain its citrus exports in 1983/84 at the 600,000 ton level registered in 1982/83. This target is to be attained through a strict export quality control program together with renewed efforts to open and expand new and promising markets.

Morocco continues to be concerned about Spain's eventual entry into the European Community and the ensuing reduction in the EC's self-sufficiency gap for both oranges and tangerines. With nearly two-thirds of Morocco's citrus exports moving into the EC at present, Morocco would ideally like to reduce its dependence on the EC market. Nevertheless, citrus shipments to the EC in 1982/83 increased in response to a stronger import demand which reflected both supply problems in some competitor countries and the application of more stringent export grade standards by Morocco's government controlled export monopoly. Export expansion in relatively new markets such as Saudi Arabia and Canada, however, is making satisfactory progress.

Greek citrus exports during the current 1983/84 season will remain at disappointingly low levels for the second consecutive year. This is due in part to a reduced fruit availability but, perhaps more importantly, to a lack of cohesive direction in industry organization. Traditionally, the Greek government and the private trade have worked closely together in a common effort to promote citrus exports. In recent months, a serious schism has emerged in what had been a successful working relationship. Private citrus exporters feel that the government is attempting to discourage private trade while fostering a shift in export responsibility to agricultural cooperatives.

Most of Greece's citrus exports--consisting almost entirely of oranges and lemons--are destined for Eastern Europe. This past season, East European importers were compelled to turn to other citrus suppliers as Greek exporters failed to negotiate timely contracts because of a delay in the enunciation of export guidelines by the government. Contract cancellations by East European buyers also were reported after the Greek government decided to raise the orange sales price. Lemon export supplies suffered last season as the domestic market outbid prevailing export price levels. In the end, short supplies induced the government to take the unorthodox step of authorizing imports this past summer in order to satisfy domestic demand. With citrus export availabilities in 1983/84 again forecast to decline and many questions in the Government's export program yet to be resolved, Greek exports appear to be headed for another difficult season.

Italian citrus production in 1983/84 is showing a return to normalcy following the drought reduced crop of a year ago. Grower returns are running at approximately 10 percent less than 1982/83 levels (on a current lira basis, unadjusted for inflation) in response to the improved fruit availability. The larger production together with the lower price levels will provide a strong impetus for a higher export volume.

Italian fresh citrus exports consist almost entirely of lemons and oranges. Roughly half of Italy's orange exports are destined for other EC countries with almost all of the remainder shipped within Western Europe. West Germany continues to be the single most important export market for lemons, although 50 percent of total movement is directed toward Eastern Europe--mostly Czechoslovakia, Hungary, and the USSR. Hard currency shortages experienced by many East European countries have severely hindered lemon export sales during the past year. Nevertheless, these countries do attempt to secure a large part of their import needs from Italy due to cost considerations. Italian lemons are noted for not possessing a particularly pleasing fruit appearance and are, therefore, priced accordingly. This year's crop quality is reported to be slightly below normal. Recent sales to Czechoslovakia are notable for their deferred payment terms for periods of up to 12 months.

Italian lemon exports during 1983/84, as well as those from Greece, are receiving strong economic support from the European Community's agricultural program. The average export subsidy earmarked for Italian lemons shipped outside of the EC was increased more than 100 percent over last year's lira level, while in comparison, the penetration premium paid by the EC on Italian lemons moving into other EC countries is unchanged from last year. A year ago, Italian exporters received more lira from the penetration premium than on exports to non-EC countries. This year, however, Italian shippers will receive 105 lira/kg. (\$64/ton) on lemons exported to other EC members but will obtain as much as 161 lira/kg. (\$98/ton) on shipments to Eastern Europe.

The EC's processing subsidy on Italian lemons is up 15 percent and the minimum purchase price paid for fruit by the processing sector was raised only 11 percent. The citrus processing sector in Italy is expected to increase its uptake of fruit significantly in 1983/84--lemon volume by 30 percent and oranges by 21 percent.

ITALY: EXPORT AND PROCESSING SUBSIDIES, 1983/84 1/  
(Dollars per metric ton)

Fruit	: Penetration : Premium 2/	: Export : Subsidy 3/	: Processing : Subsidy 4/	: Minimum Price 5/
Oranges.....:	107-125	65-118	38-112	76-151
Tangerines...:	40-106	59	---	---
Lemons.....:	64	65-98	89	145
	:			

1/ The EC export subsidy granted to Greece is the same as above, the penetration premium designated for Greece is approximately 60 percent lower. The EC processing subsidy designated for Greece runs 10-15 percent below the Italian level. Minimum price paid by Greek processors for fruit runs close to 7 percent below the Italian level. The EC minimum grower price and the processor subsidy are supplemented by national subsidies in Greece. 2/ Paid on exports to EC countries. 3/ Paid on exports to third countries. 4/ Paid to processors. 5/ Minimum price processors must pay for fruit in order to be eligible for the subsidy.

Italian demand for fresh grapefruit and grapefruit juice is largely satisfied through imports since domestic production is minimal. While Italian grapefruit imports in marketing year 1982/83 reached a record 46,900 tons, imports of U.S. grapefruit during the period actually declined 43 percent from a year earlier to 435 tons. This was largely due to the negative trade impact of the persistent strength of the dollar in relation to the Italian lira. As is true for fresh grapefruit, Israel is Italy's principal supplier of grapefruit juice. Italy, however, is a major overseas outlet for U.S. exports of single-strength grapefruit juice. Export value for shipments of this type of juice to Italy during FY 1983 (October 1982-September 1983) was \$848,000, exceeded only by shipments to Canada and France.

## CITRUS

Turkish citrus exports in 1983/84 are expected to be down somewhat from a year earlier. While citrus production is lower this year as trees recover from last winter's freeze, the primary reason for the lower export volume is a weakened demand for Turkish citrus in major export markets. Traditionally, the bulk of Turkey's citrus exports have been taken by countries in Eastern Europe. This is particularly true for lemons which normally account for more than half of all exports. In the past, lemon exports to Eastern Europe were barter type sales utilizing clearing agreements, but are now on a hard currency basis. The financial difficulties faced by almost all countries in the region and their efforts to conserve scarce foreign exchange is challenging Turkey merely to maintain past export volumes.

Opportunities for sales expansion appear brightest in the Middle East. Turkey will emphasize sales efforts this season in Jordan, Kuwait and Saudi Arabia, countries which in recent years have taken increasingly larger quantities of Turkish oranges and tangerines. It is hoped that they will partially offset smaller shipping volumes to other destinations, especially Romania and Iraq. Both of these countries recently experienced a sharp decline in purchasing power. In an attempt to assist exporters, the Turkish Government has reinstated a 5 percent tax rebate. The trade is trying to persuade the government to raise this rebate to the 10-15 percent range.

### Other Northern Hemisphere

The Japanese outlook for 1983/84 calls for a larger citrus crop from the world's third largest citrus producer, with a trade scenario keyed to a reduced import volume. The Japanese processing industry will increase its citrus fruit absorption in 1983/84. This represents an attempt to take advantage of heavier fruit supplies and lower fruit prices while rebuilding inventories of tangerine juice and canned segments which in recent months have been reduced from the excessive levels of the past couple of years.

The Japanese citrus industry is small scale and traditional in nature. Government programs affecting the citrus sector reflect a national consensus for basic food security and farm income maintenance and, therefore, tend to be inflexible and protectionistic. Japan maintains a system of quotas, high tariffs and blending requirements which limit imports of both fresh citrus and citrus juices. The U.S.-Japanese talks on Japanese import liberalization have produced little progress in recent weeks as negotiations were recessed because of national elections in Japan. With elections now out of the way, the pace of these discussions should pick up. (For more detailed information on Japan's citrus industry and its trade relationship with the United States, see featured article in the July 1983 edition of the Horticultural Products Review circular).

The Japanese are avid consumers of fresh fruit and turn to the importation of sizable quantities of grapefruit, lemons and oranges. Imports supplement and add diversity to domestic citrus supplies which are almost completely made up of tangerines. Virtually all of Japan's imports of fresh oranges and lemons and close to 90 percent of total grapefruit imports are supplied by the United States. During fiscal year 1983 (Oct. 1982-Sept. 1983), U.S. citrus exports to Japan totaled \$185 million, \$21 million above a year earlier. This past summer, a small amount of Australian oranges entered Japan for the first time, but do not appear to pose a threat to U.S. exports.

Japanese imports of grapefruit during 1983/84 are forecast at 155,000 tons, roughly 25,000 tons below last season. Imports of oranges, however, are expected to be up slightly in response to an upward adjustment in Japan's import quota. The annual orange import quota for Japanese fiscal year 1983 (April 1983-March 1984) is fixed at 82,000 tons. Lemon imports are projected at 115,000 tons, about the same level as in 1982/83. The December freeze in Florida and Texas has certainly impacted on U.S. grapefruit supplies. Nevertheless, it is anticipated that export availabilities for this priority export outlet will hold up reasonably well. The anticipated decline in Japanese imports of grapefruit is in good measure attributed to controversial health issues related to the chemical treatment of fruit. On September 30, 1983, the U.S. Environmental Protection Agency announced that the pesticide ethylene dibromide (EDB) will be phased out as a quarantine fumigant by September 1, 1984. Florida grapefruit shipments, normally accounting for 80-85 percent of all U.S. grapefruit exports to Japan, are fumigated with EDB to prevent the introduction of the Caribbean fruit fly into Japan. U.S. orange and lemon exports to Japan were largely unaffected by the EPA's decision because they originate mostly in California and Arizona--areas free of Caribbean fruit fly. While the Japanese government has continued to allow the use of EDB, importers were concerned over the possibility of a negative consumer reaction. Some U.S. exporters turned to an alternative intransit cold treatment.

The first commercial shipment of Florida cold-treated grapefruit arrived in Japan on November 20. Condition of fruit upon arrival was generally good but some quality problems were noted during later weeks in the portion of the load that went into storage. It appears that at least part of the fruit damage was directly tied to fruit immaturity and improper temperature and humidity levels maintained in storage. Nevertheless, many importers have become apprehensive of the reliability of the cold treatment technique.

At present, two of the largest Japanese grapefruit importers as well as the biggest grocery chain have decided to go exclusively with EDB-treated fruit. This decision was supported by the good quality of the EDB-treated grapefruit arriving this season and an awareness that earlier fears of anti-EDB consumer protests or adverse press coverage were largely unjustified. The issue, however, remains unresolved since EPA guidelines continue to call for the discontinuation of EDB use. The next shipment of cold-treated Florida grapefruit is scheduled to arrive in early January.

At present, U.S. exporters also are attempting to cope with a second health issue in Japan. Recent scientific research conducted in Japan has linked the fungicide, Ortho Phenyl Phanol (OPP) to cancer. It is used to protect citrus fruit against decay while in transit to distant markets such as Japan. Although the Japanese government has postponed any decision on the continued acceptability of OPP, the Japanese importers association has asked the U.S. trade to cease its application.

Mexican fresh citrus exports fell off sharply this past season due in large part to USDA imposed phytosanitary restrictions imposed in order to safeguard the U.S. industry against the introduction of citrus canker. Roughly 75 percent of Mexico's citrus exports consist of limes and tangerines with the balance made up of oranges and grapefruit. Normally, more than 90 percent of all exports are taken by the United States.

## CITRUS

The lifting in late November 1983 of all geographic restrictions within the United States on all Mexican citrus other than Mexican limes grown in non-canker infected areas will greatly enhance Persian lime exports for the remainder of the 1983/84 season. This would also have provided a major boost to tangerine exports if not for the late December freeze which hit the tangerine crop in Nuevo Leon. While Persian limes are available for export out of the southern state of Veracruz year-round, the lion's share of tangerine movement occurs October-February. Before the freeze, this year's tangerine crop was assessed as similar to last year in tonnage terms but sizing noticeably larger with export grade fruit availability much improved. Freeze damage to the crop was severe, however, and tangerine exports in 1983/84 unfortunately will not have the opportunity to benefit from the relaxation in U.S. import regulations.

Grapefruit and orange exports in 1983/84 are forecast to decline 33 percent and 40 percent, respectively. The drop-off in grapefruit shipments is largely attributed to this year's small fruit size which severely limited sales in both Japan and Western Europe. Mexican exporters are concerned that Cuba may be displacing Mexico as a grapefruit supplier in many of its export markets. According to Mexican exporters, Cuba is price discounting its fruit \$1-2 per carton below Mexican price levels. Mexican shippers fear that their "export window" based on early fruit availability is being negated by Cuba which begins harvesting grapefruit at about the same time as Mexico, or 4 to 6 weeks before Florida.

Mexico did export a small volume of early oranges, mostly Marrs and Hamlins, to the United States this season. Exports from the dominant Valencia crop, however, will be minimal because of a much smaller crop outturn, a strong domestic demand in both the fresh and processing sectors, and recent freeze damage.

The Mexican citrus juice industry is now completing a major expansionary stage in its development. Juice concentration capacity is now 60 percent greater than just 3 years ago. The Mexican juice industry had been concerned at the outset of the current season that a projected shortfall in the orange crop would severely limit its ability to obtain targeted fruit supplies. The December freeze, however, rendered much of the orange crop in Nuevo Leon and other northern growing regions unfit for the fresh market. Thus it appears that fruit intake by the processing sector in 1983/84 will increase by nearly 10 percent over a year ago.

In the United States, the 1983/84 citrus outlook was substantially changed by a major freeze which hit citrus producing areas in both Florida and Texas. Harvesting of Florida's early and mid-season orange crop was no more than 20 percent completed at the time of the freeze. Valencia harvesting was still 6 to 8 weeks away. While the full extent of the damage is not yet known, preliminary indications range from substantial fruit damage in the northern and central Florida citrus districts to spotty losses in the key grapefruit exporting region of Indian River. Florida's export availabilities of grapefruit are expected to be tight for the remainder of the 1983/84 season while supplies of sound oranges will be short which should be a factor in shipping levels to Canada. Citrus fruit loss in Texas, primarily grapefruit, is reported to be extensive. Both states imposed temporary 7 to 10 day embargos on fresh fruit shipments.

The salvaging of Texas grapefruit will be impeded by abnormally heavy stocks of grapefruit juice already on hand. Texas grapefruit is a prominent factor in U.S. exports to Western Europe--normally accounting for 40 percent of total U.S. shipments to that region. Texas is not, however, an important supplier of grapefruit to the leading export market of Japan. Total Texas grapefruit exports to all destinations will decline this season by about 75 percent from a year ago.

The supply problem now facing the United States has for the moment overshadowed some other basic problems which continue to plague citrus, as well as all other horticultural exports. The most significant of these is the persistent strength of the U.S. dollar relative to other currencies. The dollar's high value in relation to the Japanese yen and the Canadian dollar is of particular concern since these two countries alone account for two-thirds of total U.S. citrus export value. Citrus sales also have been slowed in the past year by a weakened world economy. Prospects for economic recovery, however, appear brightest in some of our most important export outlets, including Japan, Singapore and Malaysia. The Canadian economy is also expected to strengthen following the U.S. lead and even though Europe's recovery has been moving at a slower pace than initially anticipated, progress is being made. Aside from the economic factors affecting U.S. exports and increased competition from other Northern Hemisphere suppliers, the outlook for U.S. exports of citrus this season is clouded by (1) the Environmental Protection Agency's decision to phase out EDB as a citrus fumigant and (2) recent scientific research in Japan linking the fungicide OPP to cancer.

U.S. citrus exports during 1983/84 are forecast at slightly more than 800,000 tons, 13 percent less than a year earlier. The lower export volume is largely attributed to a drop-off in grapefruit and orange shipments of 70,000 tons and 60,000 tons, respectively. Lemon exports in 1983/84 are expected to remain close to last year's level.

Grapefruit export availability clearly has been reduced by last month's freeze. The fall in U.S. orange exports in 1983/84 is in large part due to substantially smaller California navel and Valencia crops. Additionally, fruit size for this season's navel crop is running very large which will deter export sales. The smaller orange crop in Florida will also hinder exports. Florida exported about 31,000 tons of oranges in 1982/83, 77 percent of which was delivered to Canada.

Florida's production of frozen concentrated orange juice (FCOJ) this season will be significantly reduced by December's freeze because of both outright fruit loss and a lower average juice yield. As a result, imports of FCOJ by Florida processors this year are now expected to reach 80 million to 90 million gallons at 42° brix, double early season expectations.

U.S. CITRUS EXPORTS  
(1,000 Metric tons)

Destination :	Oranges		Grapefruit		Lemons		Tangerines	
	1981/82	1982/83	1981/82	1982/83	1981/82	1982/83	1981/82	1982/83
Canada.....	132	163	46	46	13	12	10	10
European :								
Community..	4	29	75	83	13	10	1	2
Japan.....	83	87	136	174	108	114	1	3
Hong Kong....	95	117	1	1	4	5	---	---
Singapore....	16	25	---	---	---	---	---	1
Other.....	24	40	3	4	4	6	1	1
Total.....	354	461	261	308	142	147	13	17

SOURCE: U.S. Department of Commerce, Bureau of the Census.

Southern Hemisphere

The Brazilian citrus industry in Sao Paulo is keyed to the production and export of frozen concentrated orange juice (FCOJ). Between 65 and 70 percent of Brazil's orange crop is utilized for the production of FCOJ which in turn is sold almost exclusively in export markets. The 1983 processing season (now coming to a close) was initiated this past July during a period of sluggish world demand for FCOJ and a substantial buildup in juice inventories seemed to be in the offing. Grower returns slumped badly and concern existed that a significant quantity of oranges would go unmarketed. Export sales of FCOJ to key markets in Western Europe and the United States, however, perked up as the season progressed, and it started to appear that not only would the near-disaster so recently predicted be averted but that the season would turn out reasonably well. But in late December, a freeze struck Florida and Texas citrus areas and the Brazilian FCOJ situation was changed dramatically. Brazil's orange juice inventory is now expected to be nearly depleted due to a surge in import demand from the United States.

Brazilian orange juice stocks at the time of the freeze are estimated at approximately 300,000 tons, 65° brix (103 million gallons, 42° brix), with as much as two-thirds of this total uncommitted. However, one-third of the 300,000 tons is thought to be of low-quality juice which may not meet U.S. grade standards. Heavy rains which continued through most of the harvest, last year's uneven bloom, and the lateness of last year's crop have combined to lower the average Valencia juice ratio to about 12:1 or less, well below the desired 14:1. Much of this low ratio orange juice will be marketed in Western Europe. As shown in the table below, Brazilian exports of FCOJ in 1983/84 (July-June) are currently estimated at 555,000 tons, 23 percent above a year earlier and 32 percent above a year earlier and 32 percent above early season expectations. Ending stocks for the 1983 season are not expected to exceed 20,000 tons compared to earlier projections of up to 160,000 tons.

SAO PAULO: SUPPLY AND DISTRIBUTION OF  
ORANGES AND FCOJ, 1981-1983

Item	Season 1/		
	1981	1982	1983
<u>Oranges</u> :-----			<u>Million Boxes 3/</u>
Production 2/.....	180	195	180
Fresh Consumption.....	26	33	36
Fresh Exports.....	1	2	2
Processed.....	153	160	142
:-----			<u>1,000 Metric Tons 4/</u>
<u>FCOJ--65° brix</u> :			
Beginning Stocks.....	38	20	102
Production.....	586	550	490
Domestic Consumption....	16	16	17
Exports.....	588	452	555
Ending Stocks (June 30) ..	20	102	20
:-----			
<u>FCOJ yield</u> :			
(kg/box of oranges)....	3.83	3.44	3.45
:-----			

1/ Harvest and processing normally begins in late April or early May. The marketing season for FCOJ begins on July 1 of each year indicated. 2/  
Includes 3 to 7 million boxes of tangerines and tangors. 3/ 40.8 kilos or 90 pounds. 4/ One metric ton of 65° brix equals 344.8 gallons of 42° brix concentrate.

On January 3, the Brazilian Government increased its minimum export price for FCOJ to \$1,250 per ton. The decision was reportedly taken unilaterally by the government after a meeting with industry representatives failed to produce an agreement on price. Some industry representatives allegedly had preferred not raising the minimum price which would have enhanced exporter flexibility in placing a premium on higher grade juice while still allowing lower quality juice to be marketed at more attractive prices. Some concern exists that the new floor price could hinder sales of lower grade juice in Western Europe. No new announcement on an export quota for next year has been made, although additional changes in Brazil's FCOJ export marketing policy may be forthcoming after industry and government representatives have an opportunity to further assess world import requirements.

Brazilian juice processors have reportedly offered growers a price equivalent to about \$1.85 (assumes annual inflation and devaluation rates of 150 percent for the upcoming year) per 90 pound box of oranges for next season. This compares to \$1.00/box this season, a price generally interpreted by growers as a disincentive to production. The new price will almost assuredly induce growers to attempt to maximize fruit outturn from their orange groves. Assuming that a few more trees will be in production and smaller losses due to rain, a 10-15 million box increase in Sao Paulo's commercial orange crop is possible for 1984. Processor demand for fruit next year is expected to be very strong as the juice industry gears up for meeting what likely will be a heavier world import requirement. Brazilian production of FCOJ in 1984 should expand although perhaps not reaching the 550,000 tons recorded in 1982. Orange juice stocks in Brazil will remain tight over the coming year.

## CITRUS

TABLE 1

TOTAL CITRUS: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1981/82 TO 1983/84 1/  
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
	: 1981/82 : 1982/83		: FORECAST : 1983/84	: 1981/82 : 1982/83		: FORECAST : 1983/84	: 1981/82 : 1982/83		: FORECAST : 1983/84
<u>NORTHERN HEMISPHERE</u>									
<u>MEDITERRANEAN BASIN</u>									
Cyprus.....	278	278	279	212	204	205	48	45	48
Egypt.....	1,032	1,425	1,480	128	181	185	8	11	12
Gaza <u>2/</u> .....	180	175	180	144	145	145	8	9	9
Greece.....	952	882	761	348	220	208	139	123	113
Israel.....	1,804	1,452	1,360	761	682	761	787	688	477
Italy.....	2,977	2,645	2,998	269	232	291	966	724	900
Lebanon.....	305	325	300	173	124	80	---	---	---
Morocco.....	1,002	958	901	602	601	606	96	80	83
Spain.....	2,946	3,025	3,374	1,884	1,797	2,042	211	190	216
Turkey.....	1,112	1,132	1,034	256	237	210	131	135	123
Subtotal.....	12,588	12,297	12,667	4,777	4,423	4,733	2,394	2,005	1,981
<u>OTHER NORTHERN HEMISPHERE</u>									
Cuba.....	523	565	615	229	250	280	30	30	30
Japan.....	3,466	3,625	3,757	19	25	25	639	792	852
Mexico.....	2,527	2,183	1,913	56	32	28	448	411	448
United States <u>3/</u> .....	10,940	12,227	12,745	773	935	809	7,621	7,987	7,482
Subtotal.....	17,456	18,600	19,030	1,077	1,242	1,142	8,738	9,220	8,812
Total Northern Hemisphere:	30,044	30,897	31,697	5,854	5,665	5,875	11,132	11,225	10,793
<u>SOUTHERN HEMISPHERE</u>									
Argentina.....	1,451	1,560	66	81	297	308			
Australia.....	510	468	33	35	279	251			
Brazil.....	10,662	10,210	77	87	6,615	6,003			
Chile.....	135	140	3	5	120	98			
South Africa <u>4/</u> .....	670	639	478	440	3	3			
Uruguay.....	105	120	20	40					
Total Southern Hemisphere:	13,533	13,137	677	688	7,314	6,663			
Grand Total.....	43,577	44,034	6,531	6,353	18,446	17,888			

--Indicates zero, negligible, or not available.

1/ Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. 2/ Exports do not include shipments to the West Bank. 3/ Exports do not include category, "Other Citrus," which consists of bergamots, kumquats, and other non-identified varieties. 4/ Includes Swaziland.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attachés or USDA estimates for all other countries.

January 1984

Horticultural and Tropical Products Division, FAS/USDA  
Foreign Production Estimates Division, FAS/USDA

TABLE 2

SWEET ORANGES: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1981/82 TO 1983/84 1/  
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
	1981/82	1982/83	FORECAST 1983/84	1981/82	1982/83	FORECAST 1983/84	1981/82	1982/83	FORECAST 1983/84
<u>NORTHERN HEMISPHERE</u>									
<u>MEDITERRANEAN BASIN</u>									
Cyprus.....	136	136	135	112	100	102	21	23	23
Egypt.....	895	1,201	1,250	128	181	185	6	7	7
Gaza <u>2/</u> <u>3/</u> .....	150	150	155	125	130	130	2	3	3
Greece.....	704	665	550	228	167	150	115	100	90
Israel.....	1,105	875	820	506	453	499	499	382	256
Italy.....	1,752	1,635	1,750	128	124	140	580	413	500
Lebanon.....	215	225	215	105	75	50	---	---	---
Morocco <u>4/</u> .....	695	691	661	417	442	440	75	69	71
Spain.....	1,629	1,652	1,835	885	747	900	88	89	92
Turkey.....	675	656	600	44	44	40	95	92	84
Subtotal.....	7,956	7,886	7,971	2,678	2,463	2,636	1,481	1,178	1,126
<u>OTHER NORTHERN HEMISPHERE</u>									
Cuba.....	360	380	410	150	160	180	10	10	10
Japan.....	37	52	62	---	---	---	1	1	2
Mexico.....	1,650	1,350	1,100	12	5	3	230	250	260
United States <u>5/</u> .....	7,025	8,724	8,921	354	461	400	5,342	6,287	5,500
Subtotal.....	9,072	10,506	10,493	516	626	583	5,583	6,548	5,772
Total Northern Hemisphere:	17,028	18,392	18,464	3,194	3,089	3,219	7,064	7,726	6,898
<u>SOUTHERN HEMISPHERE</u>									
Argentina.....	681	700	32	34	109	109	112		
Australia.....	411	382	26	27	237	237	213		
Brazil.....	9,792	9,425	70	80	6,610	6,610	5,998		
Chile.....	69	70	---	---	---	---	---		
South Africa <u>2/</u> <u>6/</u> .....	537	483	378	350	96	96	60		
Uruguay.....	50	60	13	26	3	3	3		
Total Southern Hemisphere:	11,540	11,120	519	517	7,055	7,055	6,386		
Grand Total.....	28,568	29,512	3,713	3,606	14,119	14,119	14,112		

--Indicates zero, negligible, or not available.

1/ Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. 2/ Includes tangerines. 3/ Exports do not include shipments to the West Bank. 4/ Includes some tangerines. 5/ Includes temples. 6/ Includes Swaziland.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attachés or USDA estimates for all other countries.

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Horticultural and Tropical Products Division, FAS/USDA  
Foreign Production Estimates Division, FAS/USDA

## CITRUS

TABLE 3

TANGERINES: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1981/82 TO 1983/84 1/  
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED			
	: FORECAST		: FORECAST		: FORECAST		: FORECAST		: FORECAST	
	1981/82	1982/83	1983/84	1981/82	1982/83	1983/84	1981/82	1982/83	1983/84	1981/82
<b>NORTHERN HEMISPHERE</b>										
<b>MEDITERRANEAN BASIN</b>										
Cyprus.....	2	2	2	1	1	1	---	---	---	
Egypt.....	73	113	115	---	---	---	1	2	3	
Gaza 2/.....	—	—	—	—	—	—	—	—	—	
Greece.....	41	44	38	3	6	6	1	2	2	
Israel.....	92	86	78	25	26	30	24	41	25	
Italy.....	379	301	400	11	4	10	15	11	15	
Lebanon.....	35	35	30	28	26	15	—	—	—	
Morocco 3/.....	293	245	217	181	155	160	16	6	7	
Spain.....	839	920	995	639	725	770	86	64	85	
Turkey.....	175	198	180	66	47	40	11	15	14	
Subtotal.....	1,929	1,944	2,055	954	990	1,032	154	141	151	
<b>OTHER NORTHERN HEMISPHERE</b>										
Cuba.....	26	30	35	—	—	—	—	—	—	
Japan 4/.....	3,111	3,228	3,385	19	25	25	613	770	830	
Mexico.....	130	110	120	21	11	8	1	3	15	
United States 5/.....	400	355	355	13	17	17	205	156	155	
Subtotal.....	3,667	3,723	3,895	53	53	50	819	929	1,000	
Total Northern Hemisphere:	5,596	5,667	5,950	1,007	1,043	1,082	973	1,070	1,151	
<b>SOUTHERN HEMISPHERE</b>										
Argentina.....	213	240	—	2	3	—	1	1	—	
Australia.....	30	28	—	4	6	—	1	1	—	
Brazil 6/.....	530	449	—	6	6	—	—	—	—	
Chile.....	—	—	—	—	—	—	—	—	—	
South Africa 2/.....	—	—	—	—	—	—	—	—	—	
Uruguay.....	31	33	—	1	3	—	—	—	—	
Total Southern Hemisphere:	804	750	—	13	18	—	2	2	—	
Grand Total.....	6,400	6,417	—	1,020	1,061	—	975	1,072	—	

--Indicates zero, negligible, or not available.

1/ Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. 2/ Tangerine production is small and is included with oranges. 3/ Clementines only.

4/ Mainly satsumas (also called mandarin or unshu mikān), but also including mandarin hybrids, mainly Hassaku and Iyokan. 5/ Includes tangelos, which in recent years accounted for 44 to 51 percent of combined tangerine and tangelo production. 6/ State of São Paulo only, which apparently accounts for about one-half of Brazil's tangerine production. The 160,000-300,000 of tangerines which are processed are included in the orange production and processing tables.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attachés or USDA estimates for all other countries.

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Horticultural and Tropical Products Division, FAS/USDA  
Foreign Production Estimates Division, FAS/USDA

TABLE 4

LEMONS: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1981/82 TO 1983/84 1/  
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
	1981/82	1982/83	FORECAST 1983/84	1981/82	1982/83	FORECAST 1983/84	1981/82	1982/83	FORECAST 1983/84
<u>NORTHERN HEMISPHERE</u>									
<u>MEDITERRANEAN BASIN</u>									
Cyprus.....	48	49	50	33	35	34	6	7	7
Egypt.....	---	---	---	---	---	---	---	---	---
Gaza 2/.....	10	8	8	9	7	7	---	---	---
Greece.....	200	165	165	117	45	50	21	20	20
Israel.....	71	52	60	29	26	32	11	18	16
Italy.....	791	665	800	129	103	140	320	260	340
Lebanon.....	35	40	35	23	15	10	---	---	---
Morocco.....	4	9	10	1	1	2	---	---	---
Spain.....	450	426	517	349	315	360	24	25	30
Turkey.....	230	240	220	128	135	120	20	21	20
Subtotal.....	1,839	1,654	1,865	818	682	755	402	351	433
<u>OTHER NORTHERN HEMISPHERE</u>									
Cuba.....	---	---	---	---	---	---	---	---	---
Japan.....	---	---	---	---	---	---	---	---	---
Mexico.....	2	3	3	---	---	---	2	3	3
United States.....	855	859	923	142	147	150	491	465	500
Subtotal.....	857	862	926	142	147	150	493	468	503
Total Northern Hemisphere:	2,696	2,516	2,791	960	829	905	895	819	936
<u>SOUTHERN HEMISPHERE</u>									
Argentina.....	393	450	---	9	21	---	130	135	135
Australia 3/.....	40	31	---	2	1	---	23	18	18
Brazil.....	---	---	---	---	---	---	---	---	---
Chile.....	66	70	---	3	5	---	---	---	---
South Africa.....	48	48	---	32	30	---	12	12	12
Uruguay.....	18	20	---	4	8	---	---	---	---
Total Southern Hemisphere:	565	619	---	50	65	---	165	165	165
Grand Total.....	3,261	3,135	---	1,010	894	---	1,060	984	984

--Indicates zero, negligible, or not available.

1/ Crop year refers to harvest and marketing period which usually begins in late summer and extends through the spring. This corresponds roughly to August-June in the Northern Hemisphere and February-December in the Southern Hemisphere. For the Southern Hemisphere harvest occurs entirely in the second year shown. 2/ Exports do not include shipments to the West Bank. 3/ Includes small amount of limes.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselor and Attachés or USDA estimates for all other countries.

January 1984

Horticultural and Tropical Products Division, FAS/USDA  
Foreign Production Estimates Division, FAS/USDA

## CITRUS

TABLE 5

GRAPEFRUIT: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1981/82 TO 1983/84 <sup>1/</sup>  
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
	: 1981/82		: FORECAST 1982/83 : 1983/84	: 1981/82		: FORECAST 1982/83 : 1983/84	: 1981/82		: FORECAST 1982/83 : 1983/84
<u>NORTHERN HEMISPHERE</u>									
<u>MEDITERRANEAN BASIN</u>									
Cyprus.....	92	91	92	66	67	67	21	15	18
Egypt.....	---	---	---	---	---	---	---	---	---
Gaza <sup>2/</sup> .....	20	17	17	10	8	8	6	6	6
Greece.....	3	4	4	---	2	2	2	1	1
Israel.....	534	437	400	201	177	200	253	247	180
Italy.....	4	4	3	1	1	1	---	---	---
Lebanon.....	20	25	20	17	8	5	---	---	---
Morocco.....	6	6	5	3	3	4	5	5	5
Spain.....	10	10	13	6	5	7	1	1	1
Turkey.....	20	26	23	18	11	10	---	2	1
Subtotal.....	709	620	577	322	282	304	288	277	212
<u>OTHER NORTHERN HEMISPHERE</u>									
Cuba.....	110	120	130	75	85	95	20	20	20
Japan.....	---	---	---	---	---	---	---	---	---
Mexico.....	115	100	90	5	6	4	55	25	30
United States.....	2,606	2,220	2,470	261	308	240	1,559	1,053	1,300
Subtotal.....	2,831	2,440	2,690	341	399	339	1,634	1,098	1,350
Total Northern Hemisphere:	3,540	3,060	3,267	663	681	643	1,922	1,375	1,562
<u>SOUTHERN HEMISPHERE</u>									
Argentina.....	164	170	23	23	23	23	57	60	60
Australia.....	29	27	1	1	1	1	18	19	19
Brazil.....	10	10	---	---	---	---	5	5	5
Chile.....	---	---	---	---	---	---	---	---	---
South Africa <sup>3/</sup> .....	85	108	68	60	60	60	12	26	26
Uruguay.....	6	7	2	3	3	3	---	---	---
Total Southern Hemisphere:	294	322	94	87	87	87	92	110	110
Grand Total.....	3,834	3,382	757	768	768	768	2,014	1,485	1,485

--Indicates zero, negligible, or not available.

<sup>1/</sup> Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. <sup>2/</sup> Exports do not include shipments to the West Bank. <sup>3/</sup> Includes Swaziland.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselor and Attachés or USDA estimates for all other countries.

January 1984

Horticultural and Tropical Products Division, FAS/USDA  
Foreign Production Estimates Division, FAS/USDA

TABLE 6

OTHER CITRUS: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1981/82 TO 1983/84 1/  
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
	1981/82	: 1982/83	: FORECAST 1983/84	1981/82	: 1982/83	: FORECAST 1983/84	1981/82	: 1982/83	: FORECAST 1983/84
<u>NORTHERN HEMISPHERE</u>									
<u>MEDITERRANEAN BASIN</u>									
Cyprus.....	---	---	---	---	1	1	---	---	---
Egypt <u>2/</u> .....	64	111	115	---	---	---	1	2	2
Gaza.....	---	---	---	---	---	---	---	---	---
Greece <u>3/</u> .....	4	4	4	---	---	---	---	---	---
Israel.....	2	2	2	---	---	---	---	---	---
Italy <u>4/</u> .....	51	40	45	---	---	---	51	40	45
Lebanon.....	---	---	---	---	---	---	---	---	---
Morocco.....	4	7	8	---	---	---	---	---	---
Spain <u>5/</u> .....	18	17	14	5	5	5	12	11	8
Turkey <u>5/</u> .....	12	12	11	---	---	---	5	5	4
Subtotal.....	155	193	199	5	6	6	69	58	59
<u>OTHER NORTHERN HEMISPHERE</u>									
Cuba <u>2/</u> .....	27	35	40	4	5	5	---	---	---
Japan <u>6/</u> .....	318	345	310	---	---	---	25	21	20
Mexico <u>7/</u> .....	630	620	600	18	10	13	160	130	140
United States <u>7/</u> .....	54	69	76	3	2	2	24	26	27
Subtotal.....	1,029	1,069	1,026	25	17	20	209	177	187
Total Northern Hemisphere:	1,184	1,262	1,225	30	23	26	278	235	246
<u>SOUTHERN HEMISPHERE</u>									
Argentina.....	---	---	---	---	---	---	---	---	---
Australia.....	---	---	---	---	---	---	---	---	---
Brazil <u>8/</u> .....	330	326	---	1	1	---	---	---	---
Chile.....	---	---	---	---	---	---	---	---	---
South Africa.....	---	---	---	---	---	---	---	---	---
Uruguay.....	---	---	---	---	---	---	---	---	---
Total Southern Hemisphere:	330	326	---	1	1	---	---	---	---
Grand Total.....	1,514	1,588	---	31	24	---	278	235	235

--Indicates zero, negligible, or not available.

1/ Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. 2/ Mostly limes but some sour oranges and other varieties. 3/ Citrons and sour oranges. 4/ Mostly bergamots. 5/ Sour oranges. 6/ Summer oranges (natsu mikan or natsu daidai, a hybrid of mandarin with sour orange or pomelo). 7/ Limes 8/ Limes, State of Sao Paulo only, which apparently accounts for somewhat over one-half of Brazil's lime production.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attachés or USDA estimates for all other countries.

January 1984

Horticultural and Tropical Products Division, FAS/USDA  
Foreign Production Estimates Division, FAS/USDA

HORTICULTURAL MARKETS

## NEW ZEALAND

New Zealand is a relatively small but consistent market for U.S. horticultural products. Fresh and dried fruit account for over 70 percent of the \$13 million of U.S. sales. Leading items are oranges, raisins and apples. Other commodities shipped in relatively large amounts include frozen concentrated orange juice and tree nuts, especially almonds. Most fresh fruit exports occur during the Southern Hemisphere off-season, when domestic supplies and those from nearby Australia are limited. U.S. citrus exports are concentrated in January-May. Apples are shipped between September and January. The quantity of imports, especially of apples, depends upon the size of the domestic crop. A short crop in 1983 was responsible for an increase in imports--all controlled by the New Zealand Apple & Pear Marketing Board--from 3,700 tons in CY 1982 to about 4,400 tons in 1983. Imports in 1982 came from both Washington State and the Canadian Province of British Columbia. Washington supplied all of the 1983 imports. U.S. pears were not imported in CY 1983 because of phytosanitary difficulties.

The major U.S. export growth items in recent years have been FCOJ, prepared almonds and dehydrated vegetables. Onions are the leading dehydrated vegetable item. Most orange juice shipments are in bulk or institutional size containers. The growth potential of the New Zealand market is limited because of its size. With a population of only 3.2 million, the most promising avenue for growth may be product diversification.

The following table shows that the United States is the leading supplier of New Zealand lemon and grapefruit, apple, pear and table grape imports. Australia is the leading supplier of raisins and alternates with the United States as the chief orange and tangerine source. Since the mid-1970's New Zealand's total imports of lemons and grapefruit, apples and pears have tended to increase, but imports of oranges and tangerines, and raisins have been trending downward.

The United States imports significant quantities of horticultural products from New Zealand during the Northern Hemisphere off-season. Imports in FY 1983 totalled \$28 million. Leading items, accounting for 78 percent of the total, were apples, kiwifruit and fresh strawberries.

NEW ZEALAND: IMPORTS OF SELECTED ITEMS  
(Metric Tons)

Item and Origin	1980	1981	1982
Oranges & Tangerines.....	17,168	15,709	12,030
United States.....	6,699	5,823	6,631
Australia.....	10,465	9,821	3,950
South Africa.....	---	---	1,207
Lemons & Grapefruit.....	1,358	1,409	1,396
United States.....	1,320	1,377	1,339
Australia.....	37	13	54
Apples.....	1,865	2,239	3,733
United States.....	991	1,161	3,692
Canada.....	794	1,078	41
Pears.....	228	531	721
United States.....	76	338	721
Canada.....	152	193	---
Table Grapes.....	505	575	501
United States.....	505	575	501
Raisins & Sultanas 1/.....	24,255	24,000	21,560
United States.....	2.2	3.0	3.2
Australia.....	11.2	10.9	8.1
Greece.....	---	0.8	1.1
South Africa.....	0.2	0.2	0.3
Turkey.....	---	---	0.2

1/ Total in metric tons. Country breakout is in millions of U.S. dollars.

SOURCE: United Nations Trade data.

## NEW ZEALAND

U.S. HORTICULTURAL EXPORTS TO NEW ZEALAND  
Fiscal Years

Commodity	1981	1982	1983	1981	1982	1983
-----Metric Tons-----						
Fresh Fruit.....	10,944	11,048	12,395	4,817	5,917	6,056
Grapefruit.....	1,337	900	870	410	528	573
Lemons.....	384	380	495	157	189	208
Oranges.....	5,904	6,617	6,466	2,293	3,151	2,386
Apples.....	2,120	1,975	3,263	1,132	1,073	1,756
Grapes.....	688	550	541	524	562	558
Pears.....	360	533	701	189	282	416
Canned Fruit.....	100	29	72	115	35	74
Dried Fruit	1,679	1,664	1,613	4,494	4,032	3,756
Raisins.....	1,077	940	881	3,084	2,567	2,204
Prunes.....	380	567	520	652	833	776
Fruit Juices 1/.....	1,943	1,770	4,102	736	640	1,339
Conc. orange juice.....	1,255	1,767	3,769	502	636	1,254
Dehydrated Vegetables.....	19	61	122	95	242	281
Tree Nuts.....	221	248	416	999	755	1,165
Shelled almonds.....	144	135	140	585	376	440
Almonds, prep. & pres.....	47	63	140	229	207	487
Nursery Products.....	---	---	---	166	449	122
Alcoholic Beverages.....	268	111	214	338	175	177
Other Products.....	---	---	---	835	505	354
Total.....	---	---	---	12,595	12,747	13,324

1/ 1,000 liters, single strength equivalent.

SOURCE: U.S. Department of Commerce, Bureau of Census

January 1984

Horticultural and Tropical Products Division, FAS, USDA

## U.S. EXPORTS

**SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. IMPORcTS.  
NOVEMBER AND SEASON-NOVEMBER 1963, WITH COMPARISONS**

**SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS.**

## U.S. EXPORTS

**SELECTED HORTICULTURAL PRODUCTS:** QUANTITY OF U.S. EXPORTS  
NOVEMBER AND DECEMBER 1963, WITH COMPARISONS  
NOVEMBER 1962

HORTICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS/USDA

# U.S. EXPORTS

SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS NOVEMBER AND SEASON-NOVEMBER 1983, WITH COMPARISONS		: CHANGE FROM 1982		: CHANCE FROM 1981	
COMMODITY/COUNTRY AND BEGINNING OF SEASON	SEASON- NOV. 1982	SEASON- NOV. 1983	SEASON- NOV. 1982	SEASON- NOV. 1983	SEASON- NOV. 1982
<b>APRICOTS, CANNED (JUNE 1)</b>					
CANADA	64	112	23	-100	+6
CHINA, PEOPLE'S	6	35	11	+67	+11
EGYPT, REP.	1	1	1	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
GREECE	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
UNITED KINGDOM	6	16	1	+100	+100
OTHER EUROPE	1	13	7	+100	+100
ALL TOTAL	1	74	23	+100	+6
<b>APRICOTS, DRIED</b>					
TOTAL EUROPE	12	12	1	+100	+100
LATIN AMERICA	1	1	1	+100	+100
AFRICA AND CARIBBEAN	1	4	1	+100	+100
HONG KONG	1	25	12	+100	+100
JAPAN	2	20	35	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	1	74	20	+100	+6
<b>APRICOTS, FRUIT</b>					
CANADA	311	646	3400	+77	+4%
CHINA, PEOPLE'S	1+65	250	110	+100	+100
EGYPT, REP.	6	5	28	+100	+100
EL SALVADOR	1	1	21	+100	+100
FRANCE	12	12	12	+100	+100
GERMANY, FED. REP.	1	9	106	+100	+100
GREECE	1	9	106	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	13	25	309	+110	+4%
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	156	477	+110	+4%
AFRICA	1	1	1	+100	+100
FINLAND	33	12	345	-89	-2%
SWEET ASPIRE	1	1	1	+100	+100
CHINA, PEOPLE'S	17	1	97	+100	+100
NETHERLANDS	49	16	97	+100	+100
TOTAL EUROPE	241	117	4969	+294	+5%
LATIN AMERICA	161	137	965	-562	-6%
BERMUDA AND CARIBBEAN	62	14	562	-104	-6%
HONG KONG	14	742	1743	+631	+4%
JAPAN	22	182	1250	+138	+2%
CHINA, PEOPLE'S	193	95	952	-453	-4%
OTHER COUNTRIES	505	201	1952	+952	+5%
ALL TOTAL	3033	2418	19495	+330	+3%
<b>PLUMS, CANNED (JUNE 1)</b>					
CANADA	1003	6113	3406	+82	+6%
TOTAL EUROPE	21	330	865	-98	-11%
EGYPT, REP.	104	281	14	-100	+5%
EL SALVADOR	1	1	50	+100	+100
GERMANY, FED. REP.	782	3472	676	-100	-6%
ITALY	1	1	1	+100	+100
NETHERLANDS	11	12	116	+100	+100
OTHER EUROPE	14	120	116	-100	-5%
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	166	166	+100	+100
<b>PLUMS, DRIED</b>					
TOTAL EUROPE	51	51	51	+100	+100
EGYPT, REP.	1	1	1	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	166	166	+100	+100
<b>PLUMS, FRUIT</b>					
CANADA	7	27	54	+112	+11%
TOTAL EUROPE	1	426	40	-11	-6%
EGYPT, REP.	32	7	161	-76	-6%
EL SALVADOR	2	1	1	+100	+100
GERMANY, FED. REP.	115	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1065	4	463	-384	-8%
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	4	1577	+1051	+6%
<b>PLUMS, JUICE</b>					
CANADA	29	22	208	+13	+3%
TOTAL EUROPE	1	1	1	+100	+100
EGYPT, REP.	6	7	75	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	1	166	+100	+100
<b>PLUMS, JUICE CONCENTRATE</b>					
CANADA	1	1	1	+100	+100
TOTAL EUROPE	1	1	1	+100	+100
EGYPT, REP.	1	1	1	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	1	166	+100	+100
<b>PLUMS, JUICE CONCENTRATED</b>					
CANADA	1	1	1	+100	+100
TOTAL EUROPE	1	1	1	+100	+100
EGYPT, REP.	1	1	1	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	1	166	+100	+100
<b>PLUMS, JUICE CONCENTRATED</b>					
CANADA	1	1	1	+100	+100
TOTAL EUROPE	1	1	1	+100	+100
EGYPT, REP.	1	1	1	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	1	166	+100	+100
<b>PLUMS, JUICE CONCENTRATED</b>					
CANADA	1	1	1	+100	+100
TOTAL EUROPE	1	1	1	+100	+100
EGYPT, REP.	1	1	1	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	1	166	+100	+100
<b>PLUMS, JUICE CONCENTRATED</b>					
CANADA	1	1	1	+100	+100
TOTAL EUROPE	1	1	1	+100	+100
EGYPT, REP.	1	1	1	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	1	166	+100	+100
<b>PLUMS, JUICE CONCENTRATED</b>					
CANADA	1	1	1	+100	+100
TOTAL EUROPE	1	1	1	+100	+100
EGYPT, REP.	1	1	1	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	1	166	+100	+100
<b>PLUMS, JUICE CONCENTRATED</b>					
CANADA	1	1	1	+100	+100
TOTAL EUROPE	1	1	1	+100	+100
EGYPT, REP.	1	1	1	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	1	166	+100	+100
<b>PLUMS, JUICE CONCENTRATED</b>					
CANADA	1	1	1	+100	+100
TOTAL EUROPE	1	1	1	+100	+100
EGYPT, REP.	1	1	1	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100
FINLAND	1	1	1	+100	+100
CHINA, PEOPLE'S	1	1	1	+100	+100
ALL TOTAL	166	1	166	+100	+100
<b>PLUMS, JUICE CONCENTRATED</b>					
CANADA	1	1	1	+100	+100
TOTAL EUROPE	1	1	1	+100	+100
EGYPT, REP.	1	1	1	+100	+100
EL SALVADOR	1	1	1	+100	+100
GERMANY, FED. REP.	1	1	1	+100	+100
ITALY	1	1	1	+100	+100
NETHERLANDS	1	1	1	+100	+100
OTHER EUROPE	1	1	1	+100	+100
AFRICA	1	1	1	+100	+100</

## U.S. EXPORTS

**SELECTED HORTICULTURAL PRODUCTS : QUANTITY & VALUE IN R.F.T.  
NOVEMBER AND DECEMBER 1983, WITH COMPARISONS**

**SELECTED HORTICULTURAL PRODUCTS: LITERATURE CITED, 1954-1955  
NOVEMBER AND DECEMBER 1955, WITH COMPARISONS**

# U.S. EXPORTS

SELECTED HORTICULTURAL PRODUCTS : QUANTITY OF U.S. EXPORTS,  
NOVEMBER AND SEASON-NOVEMBER 1983, WITH COMPARISONS

COMP/CITY/COUNTRY AND BEGINNING OF SEASON	CITY/CITY/COUNTRY AND BEGINNING OF SEASON	4 IN METRIC TONS		PERCENT	4 IN METRIC TONS		PERCENT
		NOVEMBER 1982	NOVEMBER 1983		NOVEMBER 1982	NOVEMBER 1983	
FRANCE: CIL (EXCV 12) CANADA	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	13	6	45	13	7	20	17 *** +4%
FRUIT & VEGETABLES	***	***	***	***	***	96	PC
FRANCE	8	6	6	6	6	20	21 +37% +3%
GERMANY, FED. REP.	1	1	1	1	1	1	111 -16%
ITALY	2	2	2	2	2	12	111 +4%
NETHERLANDS	1	1	1	1	1	5	20 +4%
UNITED KINGDOM	15	15	15	15	15	17	17 *** +0%
OTHER EUROPE	19	19	3	42	42	17	17 *** +0%
SWITZERLAND	1	1	1	1	1	1	1 *** +0%
SWEDEN	4	4	3	3	3	2	2 +52% +5%
TOTAL FRUIT	50	46	60	46	46	31	31 +17% +1%
LATIN AMERICA	75	74	76	74	74	7	6 -26%
PERU	1	1	1	1	1	1	1 +12% +1%
ECUADOR	2	2	1	1	1	1	1 -17% +1%
MEXICO	1	1	1	1	1	1	1 *** +0%
JAPAN	14	14	14	14	14	14	14 *** +0%
KOREA, REP.	2	2	2	2	2	2	2 *** +0%
CHINA, PEOPLE'S	24	24	32	34	32	34	34 *** +0%
CHINA, TAIWAN	16	16	16	16	16	16	16 *** +0%
WORLD TOTAL	123	116	173	117	117	91	91 *** +0%
LEMON, CITRUS FRUIT (EXCV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	1	1	1	1	1	1	1 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	3	2	3	2	2	2	2 +52% +5%
ITALY	2	2	2	2	2	2	2 +52% +5%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	4	4	4	4	4	4	4 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
TOTAL ECCTEN	1	1	1	1	1	1	1 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	6	6	6	6	6	6	6 *** +0%
ITALY	5	5	5	5	5	5	5 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1	1	1 *** +0%
NETHERLANDS	1	1	1	1	1	1	1 *** +0%
UNITED KINGDOM	1	1	1	1	1	1	1 *** +0%
OTHER EUROPE	1	1	1	1	1	1	1 *** +0%
LATIN AMERICA	1	1	1	1	1	1	1 *** +0%
PERU	1	1	1	1	1	1	1 *** +0%
HOPS (SECV 13)	CANADA	***	***	-10% +10%	***	***	+10%
TOTAL ECCTEN	6	6	6	6	6	6	6 *** +0%
FRUIT & VEGETABLES	1	1	1	1	1	1	1 *** +0%
FRANCE	1	1	1	1	1	1	1 *** +0%
ITALY	1	1	1	1	1		

# U.S. EXPORTS

SELECTED HORTICULTURAL PRODUCTS : QUANTITY OF U.S. EXPORTS,  
NOVEMBER AND SEASON-NOVEMBER 1983, WITH COMPARISONS

COMMUNITY/COUNTRY AND BEGINNING OF SEASON	NOVEMBER		SEASON-		NOVEMBER		: NOV:POS- : NOV	: CHANGE : FROM 1982
	1982	1983	1982	1983	1982	1983		
<b>GARLIC DEHYDRATED (LAN 1)</b>								
CANADA.....	91	86	716	635	-5	-11		
TOTAL EC-TEA.....	1 <sup>c</sup>	115	439	762	+540	+74		
BELGIUM-LUX.....	---	23	14	38	***	+17%		
DENMARK.....	---	4	3	13	***	+27%		
FRANCE.....	---	7	14	28	***	+107		
GERMANY, FED. REP.....	5	43	158	370	+722	+14%		
IRELAND.....	---	---	1	3	---	+13%		
ITALY.....	---	---	4	2	---	-6%		
NETHERLANDS.....	6	10	102	152	+55	+4%		
UNITED KINGDOM.....	7	24	143	146	+406	+3%		
OTHER EUROPE								
FINLAND.....	5	3	20	31	-46	+5%		
NORWAY.....	1	1	1	4	+75	+344		
SWEDEN.....	---	5	34	59	+7	+73		
OTHER.....	4	---	72	72	-100	---		
TOTAL EUROPE.....	32	128	566	929	+294	+6%		
LATIN AMERICA.....	48	26	415	155	-45	-5%		
BERMUDA AND CARIBBEAN.....	6	2	332	12	+72	+96		
JAPAN.....	27	38	154	110	+44	+2%		
OTHER COUNTRIES.....	2 <sup>c</sup>	48	375	484	+23	+2%		
WORLD TOTAL.....	243	328	2,561	2,366	+35	-		

WINES, FROM FRESH GRAPES JAN:----- (IN GALLONS)

CANADA.....	314,840	311,426	4,259,274	3,367,422	-1	-2%
TOTAL EC-TEA.....	131,327	152,262	1,801,727	1,582,462	+16	-1%
BELGIUM-LUX.....	16,170	4,710	160,234	211,659	-71	+32
DENMARK.....	2,248	---	111,427	19,415	-100	-83
FRANCE.....	4,541	9,546	45,191	63,077	+110	+4%
GERMANY, FED. REP.....	37,032	35,030	234,789	125,556	-5	-44
IRELAND.....	---	---	49,774	7,775	---	-84
ITALY.....	1,213	2,137	2,954	4,242	+76	+44
NETHERLANDS.....	1,257	---	33,019	25,426	-100	-2%
UNITED KINGDOM.....	68,866	100,837	1,164,339	1,120,315	+46	-4
OTHER EC-CEE						
FINLAND.....	---	---	7,775	1,960	---	-74
NORWAY.....	---	---	2,867	2,273	---	-21
SWEDEN.....	2,769	6,413	31,531	45,412	+132	+44
OTHER.....	38,789	12,306	159,412	117,601	-68	-26
TOTAL EC-EUPE.....	172,455	170,452	2,003,316	1,749,623	-1	-13
LATIN AMERICA.....	53,149	21,846	70,708	23,488	-55	-61
BERMUDA AND CARIBBEAN.....	123,552	70,374	826,241	810,414	-43	-1
HONG KONG.....	5,845	4,376	67,123	67,665	+25	+1
JAPAN.....	19,175	30,415	249,945	346,525	+59	+3%
OTHER COUNTRIES.....	20,832	27,061	302,576	262,104	+30	+1%
WORLD TOTAL.....	710,718	676,496	8,418,153	6,842,241	-10	-1%

DECEMBER 1983

HORTICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS/USDA

## CIRCULAR INDEX

This index includes articles published in The Monthly Foreign Agricultural Circular, The Horticultural Products Review, from its inception in July, 1982 through December, 1983. The issue identifications (e.g., 12/83) refer to the month and year of issue. The initials following the issue identifications refer to the section of the circular in which the article can be found: MA-Market Access and Opportunities, MP-Market Promotion Activities, CU-Commodity Update, FA-Feature Articles, HM-Horticultural Markets.

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